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## Singapore

## Exporter Guide

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**2004**

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**Report Highlights:**

The Singapore economy is slated for 8% growth for CY2004 and 6% growth for CY2005. Demographic factors, including an aging population and increasing number of women in the work force, favor shifts in food consumption to convenience foods, ready-to-cook meals and away-from-home dining.

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Includes PSD Changes: No  
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## SECTION I. MARKET OVERVIEW

### Economic Situation

Singapore's economic recovery, which started from mid CY2003, was led principally by external demand while domestic demand continued to be weak. Despite the weak first half performance attributed to external factors like the SARS epidemic and the uncertainties surrounding the Iraq war situation, overall the economy registered a credible 1.1% growth in GDP.

External demand rose by 9.5% in 2003 with the strong rebound in the second half of the year as external demand for Singapore 's key manufactured exports- electronics, pharmaceuticals and chemicals-as well as for trade related services such as logistics and transport expanded rapidly.

Non-oil domestic exports for CY 2003 recorded a rise of 15% to a record US\$66.5 billion. The strength of external demand also registered in several key services sectors, including logistics, transport and travel related services. The transport and the hotel/restaurant industry recovered from the SARS epidemic only in the last quarter of 2003. As a result, visitor arrivals for the year as a whole fell by almost 20% to 6.1 million tourists.

The Singapore economy is projected to grow by 8-9% in CY2004 based on robust economic performances in the first three quarters of 2004. Unemployment levels have fallen to 3.4% while manufacturing exports and as well as services related sectors have all shown strong growth in the first three quarters of 2004. The manufacturing, financial and service sectors all experienced strong growth rates, creating 16,000 additional jobs in the third quarter of 2004 alone. The food service industry is reported to have experienced significant business improvement as tourist arrivals have bounced back to pre-SARS levels and Singapore consumers are now eating out more frequently at restaurants.

The economic outlook for CY2005 remains bright despite the projected slowing down in the pace of economic recovery in the second half of CY2005. Economists predict a growth rate of 6% for CY2005. Based on current rates of increase of U.S. exports and the rising export trends, we would project U.S. consumer oriented food exports to Singapore to increase by 7% for CY2004 and 6% for CY2005.

### Food Imports

As Singapore is practically entirely dependent on imports of all the foods that the population of 4.2 million citizens and foreign residents consume, it is not surprising that the value of the total consumer oriented foods stood at US\$2.3 billion in CY2003. Major product categories include dairy products, fresh fruit and fresh vegetables, red meats, poultry, wine and beer, snack foods and other consumer oriented products. Growth rate for the consumer oriented foods category is estimated at 2% per annum over the last three years. The U.S. market share of the consumer oriented foods category in the same year was 11%. Fish and seafood products imported into Singapore for CY2003 were valued at US\$472 million.

### Demography and Socio-economic impact

Like most developed and highly urbanized economies, Singapore's population growth rates have been falling rapidly in the last decade. The rate of natural increase in the population of

Singapore was a low 0.6% in 2003. However the increased number of foreigners being granted permanent residence in recent years augmented the slow population growth. The total population of 4.2 million comprised of 3.4 million citizens and permanent residents and 800,000 foreign workers (and their dependents) on employment passes, work permits or long term social visit passes.

The proportion of elderly residents has increased rapidly over the last ten years. Elder residents aged 65 years comprised about 7.3% of Singapore's resident population. This proportion is expected to increase to over 20% by 2050. On the flipside, the youth population(aged 15-29 years) as a percentage of the population declined from 25 percent in 1993 to 20 percent in 2003. On the positive side, the educational level of the youth population grew from an average of 10 years of schooling in 1993 to 12 years in 2003.

With better education there is a growing share of youths holding professional, managerial or technical jobs. This proportion grew from 25 percent in 1993 to 37 percent in 2003.

The number of singles has also risen in the country with the fall in the number of persons getting married over the last ten years. The age at which both grooms and brides get married have also risen.

Summary of the socio-economic impact of the changing demographic structure:

- 1) Slow growth in domestic demand
- 2) Growing personal disposal income due to better-educated workforce.
- 3) Smaller household sizes due to falling marriage and birth rates.
- 4) Demand for food products for the mature age groups growing.
- 5) Growth in international consumer tastes with increase in the number of more educated and more traveled population. The increased number of visitors and foreign workers has also contributed to the wider variety of consumer tastes.
- 6) With the rise in the number of women working, there is a corresponding growth in demand for convenience foods and ready to cook prepared meals.

#### **Advantages and Challenges for U.S. Suppliers**

<b>Advantages</b>	<b>Challenges</b>
Fast growing incomes and highly educated population	High costs of entry into major supermarket chains
Increasing preference for higher quality products	Lower prices of competing products from other countries
Proliferation of western family-style restaurants and fast food chains	Inadequate knowledge on use of U.S. products
High consumer regard for U.S. brands	High promotional and advertising costs for introducing new products

## SECTION II. EXPORTER BUSINESS TIPS

### Local Business Practices and Custom

In the arena of international trade, Singapore business practices tend to follow those in the more developed and highly urbanized economies. The country's laws are patterned after the British legal system. There is considerable reliance on international trading practices and contracts. Letters of credit are normally used for first time transactions and only after a long history of business relationship is established, the terms of payment may then change to an open trading account. It is not uncommon for buyers to request for samples from first time suppliers. In some cases, U.S. exporters may request that buyers pay for airfreight charges and handling costs of samples if they become prohibitive.

U.S. exporters who are exporting for the first time to the Singapore market would be advised to consider making use of local distributors or at least a local representative to help them guide through the requirements of the Singapore Food regulations and local trading practices.

However, the financial and credit arrangements in the domestic economy is very different. With few exceptions, supermarket chains, restaurants and other retail customers expect suppliers to give 60 days credit. There is also an implicit understanding to accept return of damaged and unsold goods. On the other hand, some small retailers like Mom and Pop stores pay cash on delivery, as their order sizes are very small. Hence, if U.S. exporters decide to carry out their own distribution, they would have to expect to meet the usual credit terms demanded by local supermarket chains.

### General Consumer Tastes and Preferences

With rising consumer incomes, Singaporeans are prepared to pay for higher quality food products or products that will provide savings in labor and time. Hence, on the supermarket shelves we tend to see an increasing number of prepared and convenience foods. Diced vegetables and seasoned portion-control meats and poultry are in increasing demand as both spouses work.

As almost all Singapore households are of Asian origin, imported foods that are to be used in local cooking have to be able to lend themselves to Asian cuisines. Asian dishes tend to be stir fried, prepared in curries or marinated in chili sauces.

### Food Standards and Regulations

Singapore food laws are delineated in the Food Act and all packaged foods sold in retail outlets have to comply with the allowable ingredients and preservatives listed in the abovementioned Act (see the FAIRS Report).

Singapore has a very open import regime and all foods, with the exception of alcoholic beverages and tobacco products are imported duty free. There are practically no non-tariff restrictions since there is very little local production and the current government policy is to source food products from all over the world. Customs clearance of imported food products is carried out electronically and the process is completed in less than 48 hours.

## **Import and Inspection Procedures**

Export health certification is required for the import of meat, poultry products and shellfish products. In some cases, random inspection and laboratory analysis of meat and poultry products are carried out. Imports of all newly imported alcoholic beverages are subjected to laboratory analysis for alcohol content.

## **SECTION III. MARKET SECTOR STRUCTURE AND TRENDS**

### **Consumer-oriented Foods and Beverages & Edible Fishery Products**

Singapore, which has the second highest per capita income in Asia, is one of the most open economies in the world with no tariffs on all food products except on alcoholic beverages. As a result, a wide range of food products from all over the world can be found on supermarket shelves in this island nation of 4.2 million people.

The major suppliers of fresh temperate climatic fruit to Singapore are U.S., Australia, New Zealand, E.U., China, South Africa, Brazil and Chile. Suppliers of tropical fruit are neighboring countries of Malaysia, Indonesia and Thailand. Singapore households buy mostly fresh leafy green vegetables from Malaysia, Indonesia, Thailand and China. On the other hand, most of the imported temperate vegetables originating from Australia, New Zealand, E.U. and the United States are supplied to restaurants and selected up market supermarkets.

Singapore imports all the meats and poultry it consumes from all over the world. Poultry and pork are the main meat items consumed in Singapore. Freshly slaughtered chicken is obtained by importing live poultry from Malaysia for slaughter in local abattoirs. About half of the chicken requirements are fulfilled through the imports of frozen chicken and chicken parts from U.S., Brazil, China and the E.U.

Since April 1999, the only source of live imported pigs (about 250,000 head annually) for slaughter comes from Indonesia. Most of Singapore's pork requirements are fulfilled through the import of chilled pork from Australia and frozen pork from E.U. and U.S. Beef, while not as widely consumed as chicken, is sold principally in the supermarkets. Major suppliers of beef include Australia, New Zealand, Argentina, China and until recently, because of the discovery of a single imported BSE case, the United States.

In the seafood category, Singaporeans consume mostly fresh and frozen finfish caught and sold by neighboring countries, i.e. Malaysia, Indonesia and Burma. Other major suppliers include Taiwan and Japan, India, Australia, Vietnam and China. In 2003, a total value of US\$472 million was imported from worldwide sources.

Singaporeans are very fond of fresh seafood; especially fin fish, crabs, lobsters and clams. While most of the finfish are purchased in the wet markets for home consumption, Singapore consumers generally go to restaurants for the consumption of crabs and lobsters.

### **Food Retail Sector**

It is estimated that about 70% of the food retail sales of US\$4 billion take place in supermarkets, the rest in convenience shops, mini marts, petrol stations and wet market stalls. Traditionally Singaporeans shop for their fresh produce, meats and fish in wet market

stalls. However, in recent years, more and more household are turning to supermarkets for their fresh produce, meats and fish requirements. Generally, importers who represent foreign brands will be responsible for the market development of the brands, advertising and promotion and increasing distribution reach to all retailers.

However, in recent years, some of the large supermarket chains and several up market retailers import western-type products directly for their own outlets. Products directly imported would include frozen prepared meals, juices, jams, confectionery, biscuits, salad dressings, prepacked deli meats and fresh temperate fruit. Products procured from local importers would include products from the Asian region, dry groceries, tropical fruit, frozen chicken and chicken parts, frozen beef, local sauces and ethnic foods.

Two major supermarket chains dominate the Singapore retail industry. The largest, NTUC Fairprice supermarket chain, has 77 outlets, almost all of them located in major residential estates. NTUC Fairprice's target audience is principally the middle and lower income groups. Competitive pricing is one of the main factors determining whether a new product should be procured for the Fairprice stores. The retail distribution reach of the Fairprice stores is very extensive as they are located in almost every large residential population concentration. Importers who require their products to be distributed island-wide and with the focus on the mass market prefer to work with NTUC Fairprice.

NTUC Fairprice supermarket chain procures almost all their food products from local importers. However, in recent years, NTUC Fairprice has embarked on extensive house branding of basic essentials like rice, bread, cooking oil, toilet paper, box tissue, sugar, dish washing liquid and canned fruit.

The second largest in terms of number of outlets and sales turnover is the Cold Storage supermarket chain with 42 outlets. This chain owned by the Dairy Farm Group targets the middle and upper-middle income groups. In the first half of 2004, Cold Storage supermarket chain took over the ownership and management of the chain of 35 Shop N Save supermarket outlets. A large percentage of products on their shelves are either western-type products or procured from E.U., Australia, New Zealand and the United States. Eight of their outlets are located in upper middle-income residential areas and customers to these outlets are principally expatriates and upper middle-income residents.

The procurement focus of Cold Storage supermarkets is on quality and freshness. Besides procuring most of their products from local importers, Cold Storage also imports significant volumes of fresh temperate fruit and frozen foods from the United States, Australia and the EU. Packaged and canned products manufactured in the Southeast Asian region and in China and which the local residents consume are procured locally from Singapore importers.

Dairy Farm, the holding company for Cold Storage supermarket chain operates three hypermarkets under the Giant name. These hypermarkets offer very competitively priced products targeted at the low to middle income Singaporean shoppers. The only other hypermarket is Carrefour, which has two stores in Singapore. Like Giant, Carrefour focuses on the lower mass consumer market.

Besides Cold Storage and NTUC Fairprice supermarkets, there are several independently managed supermarkets like Isetan, Meidi-Ya, Mustafa's and Sheng Siong. With the exception of Sheng Siong, which has ten stores, the other independently operated supermarket stores have only one outlet each. Sheng Siong started out with one mini mart about fifteen years ago and has expanded to ten stores, most of which are slightly larger than min marts. Most of its products are low priced products from China and the ASEAN region and are targeted at the lower income groups.

Besides the major supermarket chains, there are more than 23,000 mini-marts, convenience stores and grocery shops located in all residential housing estates all over the island. As these shops tend to be very small (in most cases no more than 600 square feet in retailing area), products tend to be limited to the very basic household items and to a small number of confectionery items and snack foods. Few of the shops in this category sell frozen meats and prepared meals nor is fresh produce retailed in this category.

## **Food Service Sector**

It is estimated that Singaporeans spend about US\$2.24 billion annually on cooked food. Since eating out in the numerous cooked food stalls located in almost every corner of major housing residential estates is relatively inexpensive, most Singaporeans eat out at least once a day. As most households have working wives, Singapore families find it more convenient and, in most cases, less expensive to eat out. It is not uncommon each evening to see families walk to the nearest neighborhood cooked-food stall to have their dinner.

According to government statistics, there are more than 5,500 cooked food stalls in the whole island. Besides these cooked-food stalls, fast food chains like McDonalds, Kentucky Fried Chicken, Burger King, Pizza Hut are located in large shopping complexes all over the island.

The food service industry had been very badly affected by the SARS outbreak in the first quarter of 2003. Faced with dwindling tourist arrivals and lower level patronage by Singapore clientele, restaurant chains closed unprofitable outlets and consolidated their operations by cutting costs and trimming their labor force.

During the downturn attributed by the SARS outbreak in the first quarter of 2003, Singapore customers turned away from eating out in restaurants in general. Some consumers go further downscale, from QSR outlets to the low priced cooked food market stalls. Some supermarket managers also reported an increase in purchase of uncooked foods especially those in the lower priced categories as more consumers resort to home cooking to save on eating out expenses. Additionally, some office workers bring in box lunches from home to cut down the cost of eating out.

The later half of CY2003 showed a marked improvement in restaurant turnover as the Singapore economy improved during the year. However cash flow remained rather tight as payments from restaurants to suppliers were dragged out to as long as six months in some cases. During the economic crunch in 2003, restaurants switched to lower cost food ingredients to save costs. However, with the upswing in the later half of 2003 and in early 2004, the food service industry is reverting back to better quality but higher priced foods as customers resume their original preference for quality food ingredients.

Food service companies in Singapore are widening their distribution network to other countries in the Asian region to achieve economies of scale in operation. As individual restaurant requirements are small, Singapore food service companies provide an alternative supply chain to customers who have small but frequent procurement needs for U.S. or western-type products.

It is thus not uncommon to see a number of well-known U.S. brands being transshipped or distributed from Singapore. Traders here are able to provide credit terms to their counterparts in the region or to carry out specific handling, packaging or documentation requirements. Generally products which have a longer shelf life and which do not need refrigeration are more easily transshipped.



Meat and poultry products, which require halal certification for Muslim consumers in the region, are generally shipped direct to the country of destination. Again, some Singapore traders may be involved in the ordering process as well as in the provision of short-term credit to the local importer in the destination country.

### **Food Processing Sector**

Singapore's food processing sector is very limited and the major food manufacturers are those in beer, non-alcoholic beverages, snack foods, fish processing and ethnic food activities. As Singapore has no crop or livestock production, practically all food ingredients are imported from a wide range of countries worldwide.

According to the Singapore government statistics, there are more than 300 companies making up Singapore's food processing sector most of which are small-scale operations with output barely sufficient for the local market. These firms manufacture food products ranging from beverages and snack foods to dairy and confectionery goods. With the exception of the sole cigarette manufacturer, the number of employees for each establishment tends to be less than 100 each.

The total output of the locally manufactured food, beverage and tobacco sector was US\$2.23 billion in 2003, out of which it was estimated that about 45 percent was re-exported. Products, which are exported, include cigarettes, edible oils, chocolates, seafood, milk powder, condensed milk, sauces and spices.

The source of competition varies depending on the nature of the product manufactured. For example, Australia supplies most of the milk products and dairy ingredients while China supplies most of the corn and soybean products. Malaysia supplied nearly 20 % of the food ingredient market and is the major supplier of live animals for slaughter, edible oils, tropical fruit and vegetables. The U.S. has significant market share in juices, juice concentrates, and fresh temperate fruit, nuts, flavorings, spices and leaf tobacco.



**SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS**

<b>Product Category</b>	<b>2003 Total US\$Million</b>	<b>2000 - 2003 Ave Annual Import Growth</b>	<b>Key Constraints over Market Development</b>	<b>Market Attractiveness for USA</b>
Snack Foods	136	5	Intense competition from lower cost supplier countries	Availability of wide variety of flavors. Quality of U.S. products and packaging
Poultry Meats	108	3	Market dominated by low cost frozen poultry from Brazil and freshly slaughtered chicken from Malaysia	Jumbo size chicken parts. Market niche in processed chicken parts and portion control chicken meals
Dairy Products	274	6	Lower priced dairy products from Australia & New Zealand	Quality and instant brand recognition of leading U.S. brands like Krafts
Fresh Fruit	230	-3	Intense competition from China, South Africa, Australia and New Zealand	U.S. has the reputation of being a quality supplier of fresh fruit
Tree Nuts	24	-11	Competition from low priced peanuts from China and pistachios from Iran	
Fruit & Vegetable Juices	33	4	Strong competition from South Africa and Eastern Europe	U.S. has a reputation for quality products and instant brand recognition
Pet Foods	12	11	Australia is well entrenched in the pet food market.	U.S. brands have a reputation for quality products

## SECTION V. KEY CONTACTS AND FURTHER INFORMATION

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## APPENDIX I. STATISTICS

### A. Key Trade & Demographic Information

	2003	
Agricultural Imports From All Countries (\$Mil) /U.S. Market Share (%)	4159	7%
Consumer Food Imports From All Countries (\$Mil) / U.S. Market Share (%)	2308	11%
Edible Fishery Imports From All Countries (\$Mil) / U.S. Market Share (%)	472	1%
Total Population (Millions) / Annual Growth Rate (%)	4.2	1.7 %
Urban Population (Millions) / Annual Growth Rate (%)	N.A.	N.A.
Number of Major Metropolitan Areas	1	
Size of the Middle Class (Millions) / Growth Rate (%)	N.A.	N.A.
Per Capita Gross Domestic Product (U.S. Dollars)	21,583	
Unemployment Rate (%)		5.4 %
Per Household Food Expenditures (U.S. Dollars) Per Annum	5760	
Exchange Rate (US\$1 = S\$1.74)		

TABLE B. CONSUMER FOOD &amp; EDIBLE FISHERY PRODUCT IMPORTS

Singapore Imports (In Millions of Dollars)	Imports from the World			Imports from the U. S.			Market Share		
	2001	2002	2003	2001	2002	2003	2001	2002	2003
<b>CONSUMER-ORIENTED AGRICULTURAL TOTAL</b>	2,249	2,257	2,308	238	237	244	11	11	11
Snack Foods (Excl. Nuts)	117	129	136	16	15	15	13	12	11
Breakfast Cereals & Pancake Mix	16	16	15	4	3	4	26	19	27
Red Meats, Fresh/Chilled/Frozen	169	181	203	7	6	7	4	3	3
Red Meats, Prepared/Preserved	68	71	71	10	10	10	15	14	14
Poultry Meat	96	96	108	20	15	15	21	15	14
Dairy Products (Excl. Cheese)	265	237	274	10	7	7	4	3	2
Cheese	21	22	24	2	2	2	9	9	8
Eggs & Products	41	44	47	1	1	2	3	3	4
Fresh Fruit	229	230	230	37	37	41	16	16	18
Fresh Vegetables	144	150	151	10	10	9	7	6	6
Processed Fruit & Vegetables	148	155	151	36	34	32	25	22	21
Fruit & Vegetable Juices	34	34	33	9	9	8	26	27	23
Tree Nuts	23	23	24	4	5	6	16	22	23
Wine & Beer	160	168	204	6	5	5	3	3	2
Nursery Products & Cut Flowers	43	42	39	1	1	1	1	-	1
Pet Foods (Dog & Cat Food)	10	11	12	4	5	5	37	42	45
Other Consumer-Oriented Products	667	648	586	63	73	77	9	11	13
<b>FISH &amp; SEAFOOD PRODUCTS</b>	473	496	472	8	7	7	2	1	1
Salmon	11	14	15	1	1	1	-	-	1
Surimi	4	1	1	1	-	1	10	-	3
Crustaceans	122	143	90	3	3	1	3	2	1
Groundfish & Flatfish	91	76	89	2	1	2	2	1	3
Molluscs	58	66	65	2	2	3	3	3	4
Other Fishery Products	187	196	213	1	1	1	-	1	-
<b>AGRICULTURAL PRODUCTS TOTAL</b>	3,279	3,393	3,476	290	299	296	9	9	9
<b>AGRICULTURAL, FISH &amp; FORESTRY TOTAL</b>	3,992	4,116	4,159	305	311	307	8	8	7

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office.

TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS &amp; EDIBLE FISHERY PRODUCTS

**Singapore - Top 15 Suppliers**

CONSUMER-ORIENTED AGRICULTURAL IMPORTS				FISH & SEAFOOD PRODUCTS			
(\$1,000)	2001	2002	2003	(\$1,000)	2001	2002	2003
Malaysia	489,329	488,935	446,083	Malaysia	70,077	79,500	82,178
Australia	308,310	308,912	319,899	Thailand	72,511	68,807	67,248
United States	238,034	237,236	243,586	Oceania NES	-	-	33,237
China	221,174	241,852	243,178	China	21,412	23,022	25,932
France	121,323	126,872	155,996	Taiwan (Estimated)	19,760	15,324	23,900
Thailand	121,411	135,960	146,488	Vietnam	18,956	20,362	21,612
Brazil	65,944	94,976	117,453	India	16,925	21,397	20,422
New Zealand	74,989	85,934	104,955	Japan	21,474	20,317	19,324
Netherlands	77,724	73,310	79,407	Spain	1,355	3,600	17,336
Japan	41,475	39,933	36,828	Norway	11,762	16,171	14,543
Madagascar	74,622	19,458	28,747	Burma	15,870	15,770	12,501
Germany	26,075	29,441	28,109	Australia	24,591	32,671	12,355
Italy	20,650	22,577	26,532	Chile	17,235	20,677	12,288
Taiwan (Estimated)	27,510	27,957	25,929	Hong Kong	11,187	12,443	10,846
Denmark	21,842	21,150	23,408	Yemen (Sanaa)	2,268	6,136	7,381
Other	318,485	302,595	281,289	Other	147,830	140,243	90,392
World	2,248,949	2,257,158	2,307,963	World	473,226	496,456	471,516

Source: United Nations Statistics Division.

END OF REPORT